Online Tools

Introduction for Nonprofits

These training materials have been prepared by Aspiration.
Who is Aspiration?

> Aspiration helps nonprofits and foundations use software tools more effectively and sustainably.

> We serve as **ally, coach, strategist, mentor** and **facilitator** to those trying to make more impactful use of information technology in their social change efforts.

> [www.aspirationtech.org/services](http://www.aspirationtech.org/services)
Coming Up

- Review common types of nonprofit tech tools
- Look at how to connect them to your work
- Understand their place in the larger ecosystem

Web Sites
Donations
Events
Email Blasting
Advocacy
Contacts
Multi-Function Tools
Project Management
Social Media
What are your goals?

- Measurable
- What does success look like?
- Tool-Agnostic
  - Make sure your communications plan stays in tact when the tool you are using fails you
Tool Agnostic?
## Example Nonprofit Goals

<table>
<thead>
<tr>
<th>Goal</th>
<th>Measurability</th>
<th>What does success look like?</th>
<th>Tools</th>
</tr>
</thead>
</table>
| Increase donations through online efforts for scholarships          | • Can ask people how they heard  
• Track referring link of Donation Thank You page | 2 scholarships funded through online efforts                     | • Web Site  
• Facebook |
| Increase attendees at annual event through online efforts           | • Compare this year's attendance to last year's  
• Have a “How'd You Hear” place on registration | 10% increase in attendance from last year                         | • Twitter  
• Texting |
Data > Tools

- Think of tools as impermanent
  - Tools fall away, data (hopefully) stay

- Data is the most important organizational asset
  - Content
  - Contacts
  - Process

- Plan for tech divorce when you choose a tool
Data > Tools

- **Open Source Tools**
  - Anyone can view the underlying software code
  - Little or no licensing cost, upgrade costs

- **Community Supported**
  - Mission-driven, not profit-driven

- **Open source tools leave you in a leveraged position with your data**
  - You're not tied to a specific person or company
Web Sites

- Manage, organize and create web site content
  - Content Management System (CMS)
    - Manage a web site with a visual interface (buttons, WYSIWYG) rather than digging into raw code (HTML, CSS, PHP)

- Common Examples:
  - Wordpress
  - Drupal
  - Joomla
# Web Sites

## Dashboard

<table>
<thead>
<tr>
<th>Right Now</th>
<th>Discussion</th>
</tr>
</thead>
<tbody>
<tr>
<td>137 Posts</td>
<td>235 Comments</td>
</tr>
<tr>
<td>5 Pages</td>
<td>176 Approved</td>
</tr>
<tr>
<td>12 Categories</td>
<td>0 Pending</td>
</tr>
<tr>
<td>339 Tags</td>
<td>59 Spam</td>
</tr>
</tbody>
</table>

*Theme WP Framework with 10 Widgets*

You are using WordPress 3.3.1.

Akismet has protected your site from 4,219 spam comments already.

There are 63 comments in your spam queue right now.

## Administration

- **Dashboard**
  - View and customize your dashboard.
- **Content**
  - Find and manage content.
- **Structure**
  - Administer blocks, content types, menus, etc.
- **Appearance**
  - Select and configure your themes.
- **People**
  - Manage user accounts, roles, and permissions.
- **Modules**
  - Extend site functionality.
- **Configuration**
  - Administer settings.
- **Reports**
  - View reports, updates, and errors.
- **Help**
  - Reference for usage, configuration, and modules.
Donations

- Accept and manage donations
  - Online Donation Processors
    - Allow you to accept donations through your web site
  - Peer to Peer Fundraising Tools
  - Donor management Tools
    - Allow you to manage donors as contacts with information attached

- Common examples:
  - Network for Good
  - Click & Pledge
  - Razoo
Donations

➢ To Consider:

▪ Monthly Giving
▪ Employer Match
▪ In-Kind Donations
▪ Look & Feel of your web site
Events

Create online event registration forms and manage participants

- Event Management Tools
  - Create, embed events
  - Accept registrations and payment
  - Manage registrants

- Form builders
  - Create forms that visitors can fill out on your website

Common examples:
- Eventbrite
- Evite
- Facebook Events
- Wufoo
Events

March 1: Building a Social Media Dashboard
Thursday, March 1, 2012 from 12:00 PM to 1:00 PM (PT)
San Francisco, CA | San Francisco Nonprofit Technology Center

Status
Status: Completed
Page Views: 57
Sold: 15
Pending: 0
Available: 0

Total Sales
Gross Sales: $0.00
Eventbrite Fees Owed: -$0.00
GRAND TOTAL: $0.00

Invitations Stats
Email Invitations Sent: 0
Resulting Transactions: 0
Conversion Rate: 0%
Bounces: 0
Unsubscribes: 0
Complaints: 0

Recent Orders
ORDER # | TICKET BUYER      | QUANTITY | PRICE | DATE          | PAYMENT
---------|-------------------|----------|-------|---------------|--------
71456275 | Jennifer Kelley   | 1        | $0.00 | Feb 23, 2012  | Free Order
70523991 | Anukul Gurung     | 1        | $0.00 | Feb 19, 2012  | Free Order

Recent Attendees

www.aspirationtech.org/training
Email Blasting

Send organizational emails to large lists of constituents

- Email Blaster or “Broadcast” Email Tools
  - Largely protects you from being blacklisted for spam
  - Gives you analytics based on sends, lists
  - Allows you to put together professional-looking emails (relatively) easily

Common examples:
- Vertical Response
- Constant Contact
- MailChimp

Tip:
Outlook is your evil master
Email Blasting

VerticalResponse

Welcome Aspiration
Drag and drop below to customize your home page

Reports

<table>
<thead>
<tr>
<th>Name</th>
<th>Type</th>
<th>Launch Date</th>
<th>Sent</th>
<th>Open</th>
<th>Click</th>
<th>Bounce</th>
</tr>
</thead>
<tbody>
<tr>
<td>Feb News Penguin Day Subject Line #2</td>
<td>Freeform</td>
<td>Feb 29, 2012 11:52PM</td>
<td>829</td>
<td>16%</td>
<td>10%</td>
<td></td>
</tr>
<tr>
<td>Feb News Penguin Day Subject Line #1</td>
<td>Freeform</td>
<td>Feb 29, 2012 10:50PM</td>
<td>831</td>
<td>18%</td>
<td>8%</td>
<td></td>
</tr>
<tr>
<td>Pre Dashboard March 1 training email</td>
<td>Freeform</td>
<td>Feb 29, 2012 11:52PM</td>
<td>21</td>
<td>48%</td>
<td>24%</td>
<td></td>
</tr>
<tr>
<td>SPNCT Pub Matrix post email 022311</td>
<td>Freeform</td>
<td>Feb 29, 2012 4:50PM</td>
<td>5</td>
<td>60%</td>
<td>140%</td>
<td>2</td>
</tr>
<tr>
<td>SPNCT 0220112 Analytics Post Training</td>
<td>Freeform</td>
<td>Feb 28, 2012 11:31AM</td>
<td>16</td>
<td>60%</td>
<td>88%</td>
<td></td>
</tr>
</tbody>
</table>

View All Sent Emails

Emails

<table>
<thead>
<tr>
<th>Name</th>
<th>Type</th>
<th>Last Modified</th>
</tr>
</thead>
<tbody>
<tr>
<td>Feb news Copy HTML Capture- OK TO DELETE</td>
<td>Freeform</td>
<td>Mar 05, 2012 12:23PM</td>
</tr>
<tr>
<td>Feb News Penguin Day Subject Line #2</td>
<td>Freeform</td>
<td>Feb 29, 2012 10:36AM</td>
</tr>
<tr>
<td>Aspiration expands to South Bay NEW</td>
<td>Freeform</td>
<td>Feb 13, 2012 10:26AM</td>
</tr>
<tr>
<td>Copy of Jan 2012 Google Training Announc</td>
<td>Freeform</td>
<td>Feb 11, 2012 2:53PM</td>
</tr>
<tr>
<td>Copy of Google Tech Teach-In RSVP blast</td>
<td>Freeform</td>
<td>Feb 11, 2012 2:15PM</td>
</tr>
</tbody>
</table>

View All Emails

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Dear Matt,

I've been working on issues of police accountability, locked-up youth, violence, and community investment for a long time. Sometimes I think that no example of injustice would still surprise me. I was recently proved wrong by the Corrections Corporation of America (CCA).

The CCA recently invited cash-strapped states to sell them their prisons. Part of their offer was a 20-year management contract, plus an assurance that the prison would remain at least 99 percent full. Join me in saying: Shame on you CCA. Shame on you!

Incarceration for profit is just plain wrong. Making a business out of other people’s suffering is wrong. And demanding that states guarantee that for-profit corporation chock full prisons is immoral. It's clear that private lock-ups have zero incentive to end the revolving door of incarceration as long as they can leach millions in profit from overcrowded cells.

Our country needs to invest in businesses and industries that, in turn, invest in our people, create real jobs and help to build a future we can be proud of. Join me in calling on CCA to immediately rescind its 90% clause from any future contracts with states. And to publicly agree that their future contracts and bids will not include occupancy clauses. Let's not allow the CCA to put their profits ahead of the health and well-being of our people and communities any longer.

Ever forward,

Jakada Imani
Elia Baker Center for Human Rights

PS. Read more about the CCA’s offer and our critique of prisons based on a profit motive.
Advocacy

- Create action online among your constituents
  - Petition Builders
    - Allows you to create petitions then either embed, send out a link or email it to constituents
  - “Contact Your Legislator” Tools
    - Matches constituents with their proper legislator automatically
- Common Examples:
  - SignOn
  - Votizen
  - Change.org
Advocacy

Blue Cross Blue Shield: Henry Young Needs Rehab to Live

SIGN THIS PETITION

First Name

Last Name

Email

Address

City

State

Select

Outside U.S.

Zip Code

Why are you signing? Add a reason (optional)

SIGN

Display my signature publicly

By signing, you accept Change.org’s terms of service

Signatures

171,145 out of 200,000

Petitioning

VP of Claims Management, Blue Cross Blue Shield Massachusetts (+ 2 others)

Created By

Jason Warren

Washington, DC

Why This Is Important

In October of 2011, my father Henry Young — a 62-year-old husband and father of three who was employed with Philips Medical System in Andover, MA — had a heart attack while in the gym at work. His heart stopped ten times, leaving his brain deprived of oxygen. After being comatose for several weeks, he miraculously awoke one day and began making great strides towards recovery. Currently undergoing rehab at Whittier Rehabilitation Hospital, he has made enough progress to convince his medical team, family, and friends that with continued rehab he will regain functional motor and cognitive skills.

Despite the critical progress my Dad has made in recent weeks, his insurance provider Blue Cross Blue Shield will cease coverage of my father’s rehab this coming Monday, March 5, 2012. If this happens,
Contacts

- Organize and manage organizational contacts
  - Constituent Relationship Manager (CRM)
    - Centralized Contact Database
    - Can attach information to contacts (e.g. event attendance, money donated, emails opened, etc.)

Common examples:
- Salesforce
- CiviCRM
- Convio (Blackbaud)
Contacts

Federated System

- Events
- Donations
- Email Blasting
- Advocacy

CRM

- Events
- Donations
- Contacts
- Email Blasting
- Advocacy
CRMs
Multi-Function Tools

- Combine functionalities from the previous tools
  - Multi-Function tools
    - Have a wide variety of function combinations (e.g. email blasting, advocacy, web site management, events, etc.)

- Many times their focus is around your contacts
  - Many integrated tools act as CRMs

Common Examples:
- Salsa from Democracy in Action
- Nation Builder
- eTapestry
- Wild Apricot
Multi-Function Tools

Different tools combine different functions

- What are you trying to get done?

- Web Site
- Advocacy
- Email Blasting
- Membership
- Donations
- Events
Project Management

Share and manage project (or organizational) assets

- Project Management Tools
  - Share docs, calendars, tasks and files
  - Have multiple online users

- Shared server
  - Share docs, files on a local network

Common Examples:

- Basecamp
- Red Mine
- Shared server

Tip:
This is the place to share org processes and documents (e.g. Publishing Matrix, Traffic Doc)
Project Management
Social Media

- Converse with your community
  - Blogs
    - Longer-form writing allowing conversation through comments
    - Now blog features are integrated into most CMSs
  - Social Networks
    - Shorter-form content sharing
    - Various network-specific functions for interaction

- Common Examples:
  - Wordpress
  - Twitter
  - Facebook

Tip:
Only bite off as much as you can chew.
Social Media
Caveats of Online Tools

- Can take a lot of time
  - Time = Money

- Big corporations who want your data
  - You are the product

- There are billion of tools
  - Which ones do we need?

- Tools change EVERY. SINGLE. DAY.
  - How can we keep up?
Limitations of Online Organizing

- Digital divides
- Never forget who is left out by “e” strategies
- Trust relationships are best built in person
- Online organizing is most effective when it leverages established social networks and communities
- Each community and campaign is different
- Your mileage will vary
Bottom Line

- Online tools aren't a magic bullet

- You need:
  - An measurable goal
  - A compelling message
  - Effective tactics to realize your goal
  - A plan for engaging supporters and well-defined ways for them to plug in

- eAdvocacy is more about organizing and organizational challenges than tech challenges
4 Processes for Sustainability

- Audience Assessment
  - Do you really know who you're talking to?

- Publishing Matrix
  - Do you have a model for when to use what tool?

- Message Calendaring
  - Is all online messaging on a unified calendar?

- Tracking & Metrics
  - Which techniques are working?
In Summary

- Remember that tech should support your work as an organization
- Tools should support your tech strategy goals
- Think about the minimum to be successful and then iterate up
- Tools come and go, succeed and fail. Focus on your data rather than the tool
Next Steps

- Define your organizational goals
- Think about what tools will help you achieve your goals
- Start tracking your measurable comms goals
Thank You!

▸ Questions?

▸ Comments?
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